Preservica

Interview by Rose Buchanan and Stephanie Luke, SAA Reviews Editors

Digital archivists and their institutions have a challenging mandate: to preserve and provide access to digitized and born-digital content now and in the future. What software should archivists trust to support this critical work?

We asked two digital archivists—Paige Monlux of the Multnomah County Archives (Multnomah County, Oregon) and Kathryn Slover of the University of Texas at Arlington (UTA) Libraries—to weigh in on their experience with one option: Preservica.

What is Preservica?

Slover: Preservica is a company that provides digital preservation software solutions to libraries, museums, archives, government organizations, and other institutions. UTA Libraries specifically uses Preservica Essentials (Cloud Edition), which is an Open Archival Information System (OAIS)–compliant out-of-the-box solution that utilizes automated workflows for ingest, preservation, storage, and access of digital materials.

Monlux: Preservica is also an active digital preservation system. It integrates a suite of tools and workflows into a single interface called Explorer. It offers a WordPress-based online portal, known as Universal Access, for users (internal or external) to access an organization's digital archives. Cloud-based subscription levels range from the free Starter edition to the most advanced Enterprise Private Cloud Perform version. Each ascending level offers access to increased storage capacity, security, and enhanced functionality. The Starter edition is limited to a single user and provides 5 gigabytes of storage. At the other end of the spectrum, the Enterprise Private Cloud Perform package includes unlimited storage, users, configurability, access to the API, and more. An on-premises option is also available.

How does Preservica support digital preservation? How does it support digital archivists?

Monlux: As Kathryn mentioned, Preservica is structured on the OAIS model, and it supports all the functions for ingest, storage, data management, administration, preservation planning, and access. Digital archivists can choose to use

preconfigured preservation and storage workflows or customize their own. In this way, digital archivists can actualize their organization's preservation and access policies and strategies.

Slover: Preservica supports digital preservation with an all-in-one solution. The system ingests and packages digital material, performs migration and normalization, scans for viruses, performs regular fixity checks, and provides long-term preservation and access. Preservica supports digital archivists because it is easy to use and maintain; it automates many of the functions needed for digital preservation during ingest with a user-friendly interface. The technical support Preservica offers when issues do arise is another benefit to digital archivists, especially those who are the sole digital preservation practitioner at their institution or have limited staff support from their organization.

How does Preservica work for the digital archivist? How does it work for the researcher?

Slover: Preservica's Universal Access site (powered by WordPress) makes public collections available to researchers, allowing them to browse and search metadata and text-searchable material. Preservica retains the archival hierarchy of the materials so researchers can see the context and relationships between digital items. The archivist also has the option to customize metadata at the folder and item level, so researchers can have different levels of access. The WordPress site and search indexers can be customized so the searchability of the site is left up to the institution managing it.

I have mentioned several times Preservica's automation and ease of use. When a digital archivist is ready to ingest materials, the system automatically runs a series of tasks to complete the ingest process and then, if the materials are set to be public, makes the material accessible in the Universal Access site. The digital archivist can also set rules to customize these tasks to their specifications and adjust many automated processes to make ingest simple. The system can easily create reports on ingests, integrity checks, storage use, and a variety of other components to monitor digital assets.

Monlux: Archivists can employ preinstalled metadata standards, such as Dublin Core or MODS, or create their own custom schema and index. There's even an option to link to an external catalog, which pulls the catalog metadata into Preservica. The ability to automate ingest and preservation workflows is a huge time-saver. Administrators can configure security settings and granulate access and use permissions. For digital archivists in government especially, Preservica offers a way to fulfill our obligation to the public to offer barrier-free access to our records now and continue to do so far into the future. Archivists can write research guides directly in Universal Access to aid researchers. Search functionality includes full text, filters, and facets (if using Universal Access). This makes it easier for researchers to find records even when a collection may contain thousands of items.

Multnomah County Digital Archives public access portal

UTA Libraries Digital Archive public access portal

Why did your institution choose Preservica? What kind of institution would benefit most from Preservica?

Monlux: As a government organization, Multnomah County is mandated to preserve and make accessible permanently retained public records. Following our organization's software procurement process, staff made a list of all the requirements for a digital preservation system that would meet our needs and allow us to fulfill our mandate. We began sourcing a solution in 2018. After reviewing the options available at the time, we determined that Preservica best met our needs, as well as the requisite security, privacy, and technical conditions for any software used at our organization. We began using the platform in fall 2019 and launched our public site in June 2020.

One of the biggest draws for County Archives staff was Preservica's geographical redundancy, or the fact that it stores our data on servers at several different locations within the United States. Living in the Pacific Northwest, archivists are perpetually planning for a disaster. The Big One, for example, is an earthquake that is overdue in our area. Given that the County stewards essential records, it's critical to store them in such a way that they will withstand a disaster.

I think any institution that wants or needs to perform active digital preservation on their archival records could benefit from using Preservica or a similar digital preservation system. Depending on the subscription level, institutions may get more out of the system if the administrator has somewhat advanced technical skills. Familiarity with XML, XSD, and XSLT will come in handy if an organization will use advanced configuration options, such as a custom metadata schema, or if they intend to integrate the system with their catalog. I understand that Python is also useful when making programmatic updates through the API.

Slover: In spring 2021, UTA Libraries' Digital Preservation Task Force assessed our current digital preservation efforts and established goals for future work. Using this assessment, we evaluated different options for our digital archive. We chose Preservica for several reasons, including the company's technical support, the system's ease of use and customization options, and the fact that the system provides storage, preservation, and access in one package.

Preservica's level of support and ease of use would be beneficial for an institution without a large staff or IT support. However, Preservica can be cost-prohibitive and might not be an option for institutions with limited funding. Preservica recently launched the Preservica Starter Edition, which is more cost effective for institutions without the financial resources to purchase other Preservica editions. Preservica Starter provides easy upload, automatic file transformation into preservation formats, file integrity checks, metadata templates, and a built-in public portal. Despite these features, Preservica Starter has a much lower storage capacity than other Preservica editions. It also allows for only one user at the Starter level and three at the Starter Plus level. The Starter Plus edition does have a few additional

features such as bulk metadata editing, the ability to brand your public portal, and Google Analytics integration.

How does Preservica differ from other platforms?

Monlux: Full disclosure—Preservica is the first digital preservation system I have worked with, so I don't have firsthand experience with other products. I do know that there are only a few systems that offer a full array of OAIS-modeled workflows and a public portal at the same time, without the need for additional integrations.

Slover: Preservica is a proprietary system, so the code is not published and available to the larger digital preservation community. Many other tools for digital preservation, like [Archivematica](#) and [Islandora](#), are open source. Open-source tools can be great if there is an active user community, as well as the technical knowledge and support to maintain them, because they are usually available for free or at a lower cost than proprietary tools. Support for proprietary tools is usually built into the subscription, but users are dependent on the company's survival for the products' long-term sustainability.

Additionally, Preservica differs from other platforms because it provides ingest, preservation, storage, and access in one product. Many other tools require a combination of systems to do that work.

What do you consider the best features of Preservica?

Monlux: I think the comprehensiveness and flexibility of the system and the ability to automate workflows are the platform's greatest strengths. That said, the people element can be nearly as important as a product's functionality when it comes to user experience. Preservica has an active user community. Other users are quick to help out with questions or support enhancement requests. I have found Preservica's support team to be reliably responsive and knowledgeable. Moreover, the company proactively communicates about their development road map.

Slover: I think the provided support is one of the best features of Preservica and one of the main reasons we chose it. We are working toward building a sustainable digital preservation program and having reliable support and ongoing knowledge of the system is critical to that. We have not been using Preservica for long, but the few support tickets I have submitted while still learning the system were resolved in a timely manner. I also consider the Universal Access site to be one of Preservica's best features. UTA Libraries has a strong commitment to access, and the ability to provide easy access to materials after we ingest them is extremely important. It is also great that we don't have to worry about working with one system for preservation and a different one for access.

What aspects of Preservica do you think could improve?

Slover: We are just getting started using Preservica at UTA Libraries, and I have only ingested one collection. While I am still learning the system, it is difficult to say what could be improved. Most of the issues I have come across so far have been the result of user error rather than system error.

Monlux: When users identify an opportunity for improvement to the system, they can share these suggestions on the [user community hub](#) and with Preservica directly. On at least an annual basis, customers can vote on enhancement requests for prioritization. Past suggestions, among others, that garnered community support included updating the user interface and simplifying certain ingest workflows. My understanding is that Preservica is actively working to address and roll out improvements in these areas.